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A Letter from the President

Dear Customer:

Congratulations on your purchase of the TOPS Mobile PDA Software! Now, using your Palm OS or Pocket PC OS Personal Data Assistant, you and members of your management company can feel free to roam your community without the need for bulky clipboards and printed reports.

Owner data can instantly be accessed, and property files are directly linked to open Service Requests, Work Orders, and CC&R records. Vendor information is available to allow you to call a vendor from your cell phone or an owner's home.

Think of the possibilities! Instead of printing dozens of reports, writing notes, and spending costly hours entering new data into TOPS, you can enter that data directly into the PDA while you are on site! Then, simply sync the data from the PDA to TOPS Software and viola! It's all there! No more extra work.

Prepare yourself for the freedom of ultimate mobility. You can create service requests, work orders, CC&R violations, and more on the fly, at any time, from anywhere.

The TOPS Mobile PDA can also save you money in equipment and networking costs. Imagine giving guards at guard gates PDAs instead of having to install costly computer systems in these sensitive areas.

Visit our website at www.topssoft.com for more information on this and other products offered by TOPS Software.

At TOPS Software, our goal is to create products that make the management of communities easier. The TOPS Mobile PDA is just one more step toward that goal.

Best Wishes,

Jeff Hardy, President

What's New In TOPS Mobile PDA

The new name, **TOPS Mobile PDA**, says it all. Take all the important information you need with you to the field or home to handle problems after-hours. It's like having the office version of your TOPS Software with you wherever, and whenever, you are.

New for TOPS Facts

What's new here? "Everything!" TOPS Facts on the PDA maps to the Community Fact Sheet available from the file menu in TOPS 2000™ or TOPS On-Site™.

New for the TOPS Mobile PDA

General

1. All new graphical user interface.
2. Major improvement in data access speed.
3. New 'About' menu contains the full name of the community and the last date and time the sync was done.
4. New 'smart button technology' tracks user progress.
5. Advanced search capabilities added to all modules.

Owner

1. Now supports multiple owners for each home (primary, secondary, previous, renters, and developers).
2. The owner's current balance has been added.
3. Flex data fields now available.

Quick Reference

1. Has been redone to display the number of items (Violations [CCR], Work Orders [WO], Service Requests [SR]) linked to each property.

Quick Reference (cont...)

1. Double clicking on a property address goes to the owner record for that home.
2. Quick Reference is updated with new records added to the PDA.

Work Order

1. 'Common Ground' has been added as a search option.
2. The location now defaults to the selected home.
3. Numbering system has been improved

CCR

1. 'Notes' has been corrected to sync back into the system.
2. Numbering system has been improved

Pool Pass

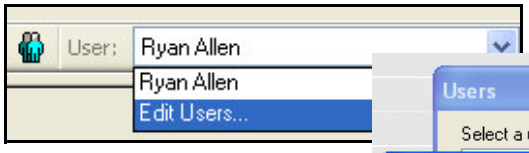
1. Pool pass is a new module added into TOPS Mobile PDA. Tracks pool passes for members in the community.

Setting up your Palm™ OS PDA

Before you install TOPS Mobile PDA for use in your Palm™ OS PDA, you must set up the user name for the individual that will be using the TOPS Mobile PDA. Follow the directions below to add a user:

1. Open your Palm™ Desktop Software (Generally found under Start, Programs, Palm Desktop, Palm Desktop.)
2. Click Tools, Users…
3. Click New User
4. Enter the name of the user

To change the user name on a Palm™ OS, (if a new employee replaces an old one, for example) you must first remove the key from the old user, and then add the key for the new user.



Once the TOPS Mobile PDA has been installed , you may not rename or delete this user name. The Palm OS portion of TOPS Mobile PDA security is based on the user name, and therefore, your key will cease to work if the user is re-named or removed.

Syncing with an invalid user name will cause all data in the Palm Pilot to be discarded.

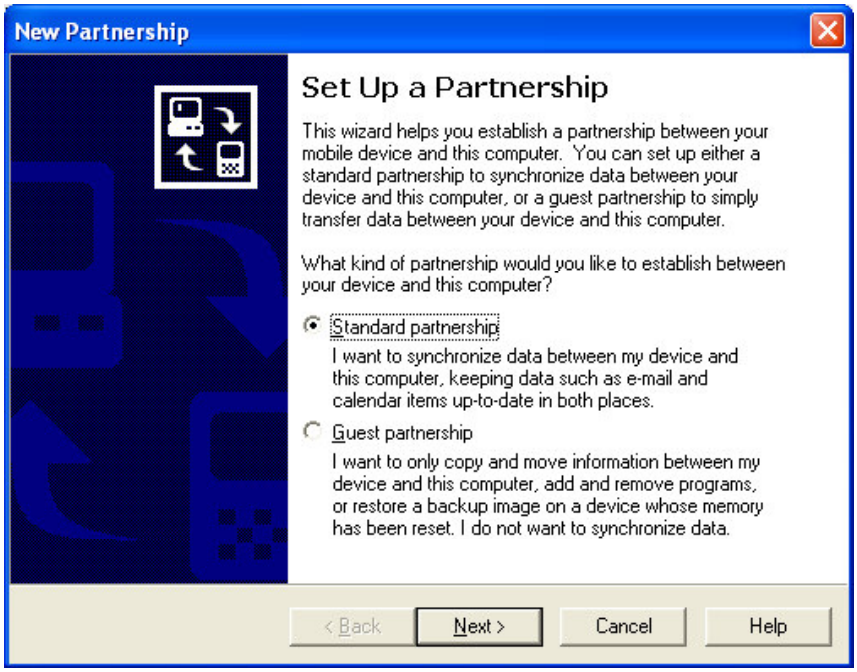
Palm™ Installation Tip:

TOPS Software used a specialized programming language (CASL) to create the HHO Interface. Because of this, the program should NOT be installed through the Palm™ Desktop. Instead, please follow the installation instruction in this manual to install your TOPS Mobile PDA software.

Setting up your Pocket PC® OS PDA

Unlike the Palm OS portion of TOPS Mobile PDA, which uses user-based security keys, security keys for the Pocket PC are stored in each individual unit. This is a significant difference in that you are not limited to a single computer. You may sync your Pocket PC with any number of computers. This is an excellent method of quick data transfer between corporate and remote offices.

If this is the first time you have connected your Pocket PC to your computer, you will need to define a partnership between the Pocket PC and the computer. You may choose to set up a standard partnership or a guest partnership. Because the key is stored on the unit itself, TOPS Mobile PDA will work either way.


New Partnership
Set Up a Partnership
This wizard helps you establish a partnership between your mobile device and this computer. You can set up either a standard partnership to synchronize data between your device and this computer, or a guest partnership to simply transfer data between your device and this computer.
What kind of partnership would you like to establish between your device and this computer?
Standard partnership
I want to synchronize data between my device and this computer, keeping data such as e-mail and calendar items up-to-date in both places.
Guest partnership
I want to only copy and move information between my device and this computer, add and remove programs, or restore a backup image on a device whose memory has been reset. I do not want to synchronize data.
< Back
Next >
Cancel
Help

We recommend you select Standard partnership for your primary computer, and a Guest partnership for any computers you will be using only rarely.

Compatibility Notice:

To maintain a standard for purposes of this manual, the process of communication between TOPS 2000™ and the Pocket PC will be referred to as hot synching, or pressing the hot sync button. This can be achieved on the Pocket PC by simply placing the Pocket PC in its cradle, or plugging the Pocket PC into the communication port.

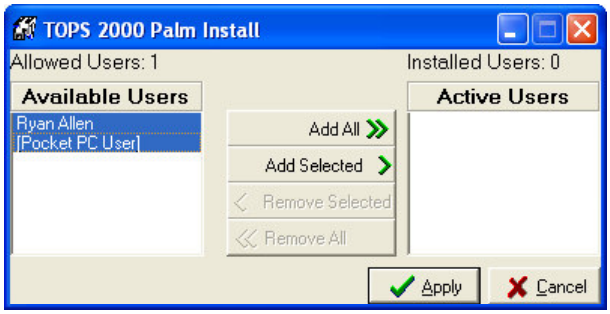
Installation

1. Insert the TOPS Mobile PDA installation disk into your computer's CD-ROM drive
2. Wait for the Autorun to appear, or, if it does not appear, navigate to the CD-ROM drive and double click Autorun.EXE.
3. Insert your PDA into it's hotsync cradle, or plug it into the connector cable.
4. Click the appropriate button on the installation screen, based on the type of PDA (Pocket PC powered, or Palm powered) you intend to use.
5. Palm OS: Select the user name under which you wish to install the software on the PDA. And click Install Files
6. Pocket PC OS: Make sure your pocket PC is correctly connected to the PC, and click Install Files.

TOPS Mobile PDA Install (Pocket PC)
Please ensure that your Pocket PC is in it's cradle before you install the files.
Install Files

Key Installation

1. Remove the floppy disk labeled TOPS Mobile PDA from the package in which you received your TOPS Mobile PDA software.
2. Insert the disk into the diskette drive (3½ Floppy A:)
3. Click Start, Run
4. At the run line, type **A:\KeyInstall**
5. Verify you have enough keys to install a user. (The top of the window should say 'Allowed Users #' Where the # indicates the number of keys you purchased.)
6. The left side of the window displays a list of all of the users installed on this machine. The right side of the window displays users who are authorized to use the TOPS 2000™ PDA Interface. (Assign keys to users in steps 7-10 to authorize users)
7. Click a User ID on the right side. The Add Selected button will become active.
8. To install a key and the necessary files for the current user, click the **Add Selected** button. To install a key and the necessary files for all valid users click the **Add All** button.
9. The chosen user or users will be moved to the "Installed Users" list. The number of allowed users will be reduced by the number of installed users. The installed users will be incremented by the number of new installed users. If you install more users than you have keys, the allowed users will be negative. Please remove the needed number of users to bring allowed users up to zero (0).
10. Click the **Apply** button
11. If the installation is successful you will see the success screen.



Use the Install screen to authorize users to use the TOPS Mobile PDA.

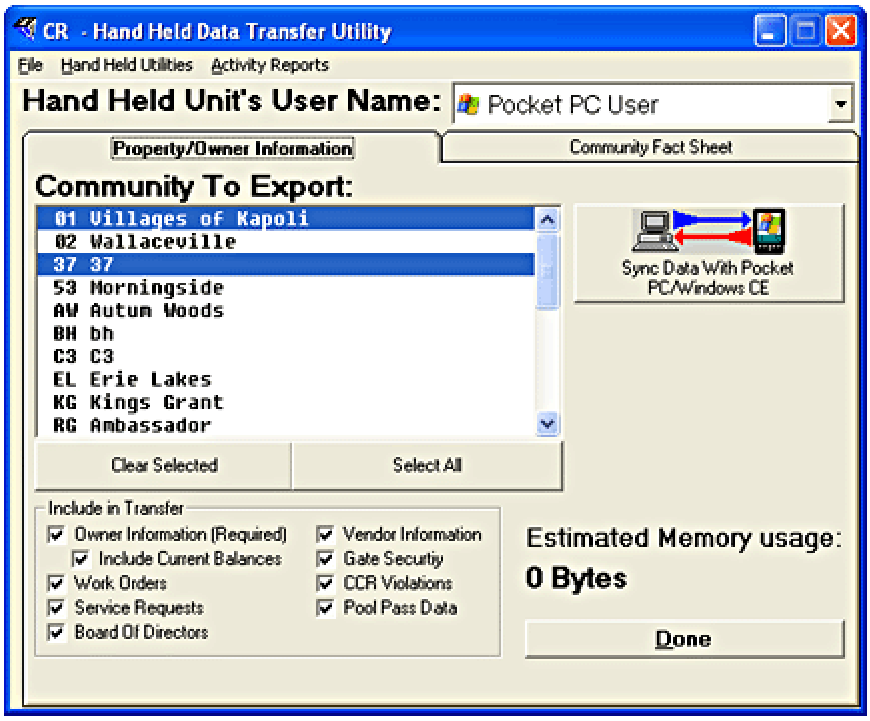
Please note Pocket PCs will always be called [Pocket PC User] in TOPS.

The Handheld Data Transfer Utility

The Handheld Data Transfer Utility is your interface between TOPS 2000™ and your PDA. Use this interface to synchronze community data to your PDA and back to your computer.

To Access the Handheld Data Transfer Utility

1. Open TOPS 2000™ or TOPS On-Site™, and open any community.
2. Click Utilities, PDA Utility.



The Hand Held Unit's User Name will display the Windows icon for Pocket PC users, or the hot sync icon for Palm users.

Locating your PDA folder (Palm Only)

When you first run the Data Transfer Utility, the system may open a browse window that instructs you to select the folder where your PDA was installed. Usually this folder is C:\Palm, but you will need to locate your own if it is different.

1. Click the plus sign next to the 'C' drive (or the drive letter where you installed your PDA)
2. Locate your PDA folder. (often C:\Palm\)
3. Click OK.

Creating a TOPS Category (Palm Only)

If you wish to store your TOPS icon in a special group on the Palm:

1. Click the category name in the top right corner of your Palm™.
2. Select "Edit Categories".
3. Click "New" and type "TOPS". Click OK.
4. Click the menu button in the bottom left corner of your Palm™ text entry area. Select "Category".
5. Scroll down to TOPS 2000™ and click the down arrow next to "Unfiled". Select TOPS, and click Done.

Unauthorized Users Beware:

If an unauthorized user hot syncs under a valid User ID, their PDA will be completely initialized with the valid user's setup. Any TOPS data the unauthorized user created in their PDA will be destroyed. TOPS Software claims no responsibility for lost data due to misuse of the hot sync program.

How to Sync Owner and Properties Data

You may export as many communities as you wish, regardless of community size. Your only limitation is the available memory in your PDA.

How To Synchronize Data from TOPS 2000™ or TOPS On-Site™

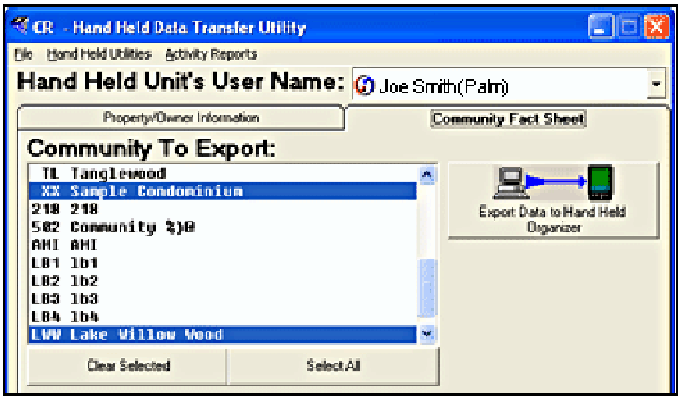
1. Open TOPS 2000™ or TOPS On-Site™
2. Click **Utilities**, Handheld Organizer **Utility**.
3. A list of existing communities appears in the left column. A list of authorized users appears in the right column.
4. Click the User ID of the PDA the data will be stored in. (Pocket PCs will always be called [Pocket PC User].
5. Click the name(s) of the community(ies) you wish to store in the PDA. Clicking once on a community name will activate it for syncing. Clicking again on a selected community will deactivate it.
6. Check the boxes at the bottom to include the desired data from TOPS 2000™ or TOPS On-Site™.
7. Place your PDA is in its' hot sync cradle.
8. Click **Export Data to PDA**. (Pocket PC Users stop here.)
9. An estimate of the amount of memory these files will require will display in the lower right hand corner. A message will appear that states 'Export Complete. Hot Sync Now.'
10. Click the **Hot Sync button** on your PDA's cradle. Wait for the Hot Sync to complete. (If you have a problem syncing, please refer to the manual that came with your PDA device.)
11. Click **OK**. Click **Done**. You may now remove your PDA from it's cradle and use the TOPS Mobile PDA.

How to Sync Community Fact Sheet Data

The Community Fact Sheet keeps all of the important data you need to access about the communities you manage. Since this data rarely changes once it has been entered into TOPS, it is not necessary to sync it with your PDA as often as you will need to sync your owner and property data. As such, this export is kept separate from the properties and owners export.

How To Synchronize Community Fact Sheet Data

1. Open TOPS 2000™ or TOPS On-Site™
2. Click **Utilities**, Handheld Organizer **Utility**.
3. Click the User ID of the PDA the data will be stored in.
4. Click the Community Fact Sheet tab under the user name.
5. Click the community(ies) for which you wish to store fact sheet info.
6. Place your PDA is in its' hot sync cradle.
7. Click **Export Data to PDA**. (Pocket PC Users stop here.)
8. A message will appear that states 'Export Complete. Hot Sync Now.'
9. Click the **Hot Sync button** on your PDA's cradle. Wait for the Hot Sync to complete.
10. Click **OK**. Click **Done**. You may now remove your PDA from it's cradle and use the TOPS FACTS.



You must choose which data you want to upload, Property and Owner info, or Community Fact Sheet info. You may upload both, but you must perform two exports. Use the tabs at the top of the HHO Utility to switch between the two upload types.

How to Sync from your PDA

After exporting data to your PDA and making changes to the data on the PDA, you may wish to pull the new data back into TOPS 2000™. Follow the instructions below to sync from your PDA.

To Synchronize Data from the PDA

1. Open TOPS 2000™ or TOPS On-Site™
2. Click **Utilities**, PDA **Utility**.
3. A list of existing communities appears in the left column. A list of authorized users appears in the right column.
4. Click the User ID of the PDA the data is stored in.
5. Click **Update TOPS with Data from the PDA**.
6. A message will appear that states 'Ready to import data from hand held files. Activate data sync now.'
7. Place your PDA is in its' hot sync cradle, or plug it in if your PDA does not use a cradle. (If you are using a Pocket PC, skip to step 10.)
8. Click the **Hot Sync button** on your PDA's cradle. Wait for the Hot Sync to complete. (If you have a problem syncing, please refer to the manual that came with your PDA device.)
9. Click **OK**.
10. Ensure that the Hot Sync was completed successfully. Click **Yes**.
11. The success window will appear. Click **OK**.
12. Click **Done**. You may now remove your PDA from it's cradle and view the new data in TOPS 2000™ or TOPS On-Site™.

Printable Sync Logs Tip:

When the update of TOPS data is completed from the PDA, a log file is created of any transactions. (data altered) Up to five logs are stored in the HHO Utility. To access and print a log, click Activity Reports. Select the log file you wish to view.

Using your PDA

Inputting Data with the Stylus

Click

Tap once on the screen with the tip of the stylus.

Double Click

Tap twice quickly on the screen with the tip of the stylus.

Click and Drag (Select)

Tap at the beginning of the selection area and drag the tip of the stylus along the area, until the entire selection is highlighted in yellow.

Typing with the keyboard

Click the keyboard button (on the Palm Pilot it appears as an ABC over a dot) and press the letters with the tip of the stylus to type.

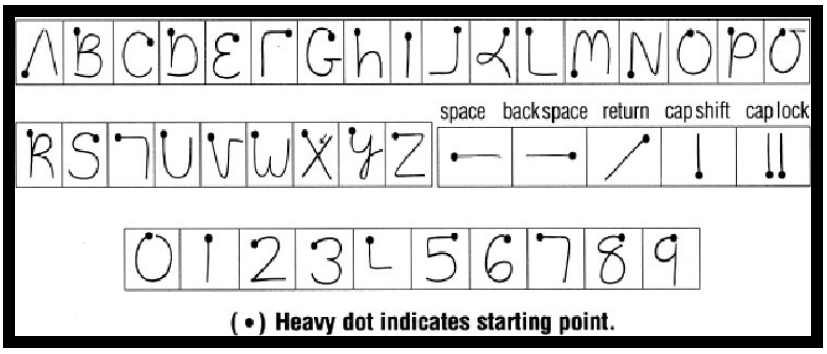
Entering text with the Graffiti script

Use the area provided on your handheld for writing text. Write the shape of the letter as supplied with the PDA documentation (see the illustration below)

Viewing Additional text

Palm: Click the ABC text button on a field to expand text fields and read the entire contents.

Pocket PC: Use the scroll button on your Pocket PC to scroll up and down within a text field.



General Instructions

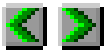
Useful Buttons

Previous Screen

Use this button in the top right corner to navigate to the previous screen, similar to the 'back' button on an Internet browser.

Main Menu

Use this button in the top right hand corner to jump to the main menu from anywhere in the program.

Next and Previous 

Use these arrow buttons to navigate to the next or previous record or property.

Clear Button

Use this button to clear the currently selected record (property or owner).

Search Button

Use this button to display a list of available records in this module, and select a property of an owner from that list.

List Button

Use this button to display a pull down list of available options, and select an option from the list.

Flex Button

Use this button to jump to flex data fields for the selected property. This button appears in the Owner Information, and the Quick Reference Screens.

CCR Button

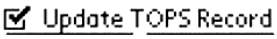
Use this button to jump to CC&R Violation records for the selected property. This button appears in the Owner Information, and the Quick Reference Screens.

WO Button

Use this button to jump to Work Order records for the selected property. This button appears in the Owner Information, and the Quick Reference Screens.

SR Button

Use this button to jump to Service Request records for the selected property. This button appears in the Owner Information, and the Quick Reference Screens.

Update TOPS 

Records created in TOPS Mobile PDA are NOT automatically updated to your TOPS 2000™ or TOPS On-Site™ computer when you synchronize. This avoids accidentally overwriting changes that have been made in the record in the TOPS main system. If you DO wish the changes you have made in a record on your PDA to update TOPS 2000™ or TOPS On-Site™, simply check this option. Be sure to check it if you want new records to be synchronized with TOPS.

The Main Menu

The hand-held organizer main menu contains 9 menu items to allow you to quickly access each of the sections available in the TOPS Mobile PDA. Following are descriptions of each of the sections, and what they are:

Community Selector

Click this button to access a pull down menu of all of the communities stored in your PDA. Click the community code for the community you wish to open.

Owner Information

Use to select a specific owner from the community listing. You are provided with several methods to select an owner in this window.

Quick Reference

View a quick list of all of the homes on a street, and view the number of CC&R violations, Work Orders, and Service Requests. Quickly select a home and view CC&R violations, Work Orders, and Service Requests.

Gate Security

Ideal for use by guards in a gated community. Guards can walk through a parking lot and check license plates with their PDA.

Work Orders

View or create Work Orders for the selected home using this section. Work Order fields correspond to TOPS 2000™ or TOPS On-Site™ by tracking Work Order Types, Vendor assignations, authorization codes, Location links, and notes.

Menu Navigation Tip:

Use the Owner Information, or Quick Reference buttons to select a property. Once a property has been selected, you may click Work Order, Service Request, or CC&R to view any records for this property, or add new ones.

Service Requests

View or create Service Requests for the selected home using this section. Service Request fields correspond to TOPS 2000™ or TOPS On-Site™ by tracking Work Order Types, Authorization codes, Location links, and Notes.

CCR Violations

Access any CC&R violation records for this home, or add one. CC&R fields correspond to TOPS by tracking violation codes, status, notes, actions taken, and actions to take.

Vendor Information

Quickly access vendor information for a community to make a phone call, visit, or select a vendor for Work Order assignation.

Pool Pass

Quickly access pool members to check if a pool guest is a member. This can be a handy way to screen members when entering the pool.

Community Fact Sheet

Quickly access key information about the community, like location, contractors, emergency contact info and insurance coverage.

You may select a community, and then make a program selection from the main menu.

Owner Information

The Owner Information Screen allows you to select a property from the Owner Module, and view information about the owners of that property. This interface also allows you to quickly access CC&R, Work Order, or Service Request records for this property.

To Select a Property Record

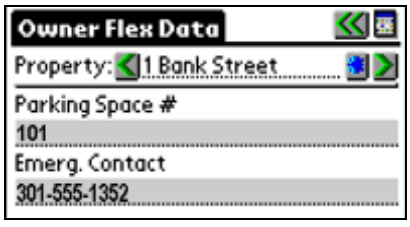
1. From the main menu, click the Community field to view a menu listing all of the communities currently stored in the PDA.
2. Select the community in which the property is located.
3. Click Owner Information.
4. Click the (clear) button to clear the property field.
5. Enter the first 3 or 4 letters (or numbers) of the street address. (You may enter the street name, such as Easy, or you may enter the address, such as 100.)
6. Click the (search) button to view a list of properties matching the characters you entered in.
7. Locate the property you wish to open, and click to select it.
8. The owner information for this property is displayed.

To view Flex Data, CC&R, Work Order, or Service Requests

1. Follow the directions above to select a property.
2. Click the Flex, CCR, WO, or SR button to view the appropriate section.

The Owner Info Screen provides standard contact information on owners in the selected community.

Clicking the flex button will reveal the flex data on record for that owner.



Quick Reference

The Quick Reference Screen displays a list of all of the properties on a particular street in a selected community. This list allows you to quickly view the number of CC&R, Work Order, and Service Request records currently stored in that property record.

To Display a Property Listing

1. From the main menu, click the Community field to view a menu listing all of the communities currently stored in the PDA.
2. Select the community in which the property is located.
3. Click Quick Reference.
4. Click the (list) button to view a street listing.
5. Click the street name in which you wish to view properties.
6. All of the properties on the selected street are displayed.
7. Locate the property you wish to view, and click on it to select it.

To view CC&R, Work Order, or Service Requests for the selected property

1. Follow the directions above to select a property.
2. Click the CCR, WO, or SR button to view the appropriate section.

Use Quick Reference to quickly locate a home, and instantly see the number of records associated with it.

Quick Ref(XX)
Easy Street
Property CCR WO SR
200 Easy Street CCR:1 WO:2 SR:1
300 Easy Street CCR:0 WO:0 SR:0
400 Easy Street CCR:0 WO:0 SR:0
500 Easy Street CCR:0 WO:0 SR:0
600 Easy Street CCR:0 WO:0 SR:0
700 Easy Street CCR:0 WO:0 SR:0
800 Easy Street CCR:0 WO:0 SR:0
CCR
WO
SR

Gate Security

The Vehicle Information section of the PDA interface is designed to be used by guards in conjunction with the Guard Gate Security optional module in TOPS 2000™ and TOPS On-Site™. Guards can use their PDA while patrolling parking lots to confirm authorized or unauthorized cars. This interface may also be useful at a guard gate to allow guards to confirm or deny authorized vehicles without the necessity of a computer and network line in the gatehouse.

To Select a Vehicle

1. From the main menu, click the Community field to view a pull down menu listing all of the communities currently stored in the PDA.
2. Select the community in which the property is located.
3. Click Vehicle Information.
4. Click the (clear) button to clear the Tag # field.
5. Enter the first 2 or 3 letters (or numbers) on the license plate. (You may enter any combination of letters/number as they appear on the license plate. i.e. if the license plate is HOT DOG, you may search for HOT or DOG.)
6. Click the (search) button to view a list of tags matching the characters you entered in.
7. Locate the tag you wish to open, and click on it to select it.
8. The vehicle information for this tag is displayed.

Assign a PDA to each guard house, and guards can use the palm to verify vehicle plates and note which vehicles are authorized to be parked in your community

To Add a New Vehicle

1. Follow steps 1-3 above to select a community, and open the vehicle information screen.
2. Click the New Vehicle button.
3. Select the property associated with the vehicle.
4. Enter the Tag Number in the Tag # field. (This field is required in order to sync new work orders from the PDA to TOPS 2000™ or TOPS On-Site™.)
5. Enter the sticker number for the vehicle, if any.
6. Enter the Parking Space number for the vehicle, if any.
7. Enter the Year, Make, Model, and Color of the vehicle
8. Click the relation button to select the relationship of this vehicle's owner to the associated property owner.

To Deny a Vehicle Entry

1. Select the Tag Number of the vehicle.
2. Uncheck the 'Permitted on Property' option.

To Update a Record to TOPS

1. Check the Update TOPS Record checkbox.

Work Orders

Designed to track work orders assigned to vendors or staff, the Work Order module of TOPS 2000™ or TOPS On-Site™ allows you to create and track these records. You can view or change work orders on the PDA or add new ones. Work orders can be for common area jobs or jobs done for specific homes

To Select a Property Record

1. From the main menu, click the Community field to view a pull down menu listing all of the communities currently stored in the PDA.
2. Select the community in which the property is located.
3. Click Work Orders.
4. Click the (clear) button to clear the property field.
5. Enter the first 3 or 4 letters (or numbers) of the street address. (You may enter the street name, such as easy, or you may enter the address, such as 100.)
6. Click the (search) button to view a list of properties matching the characters you entered in.
7. Locate the property you wish to open, and click on it to select it.
8. The primary owner for this property is displayed.

To Select a Work Order by Property Address

1. Follow the directions above to select a property record, or select “Common Property” .
2. Click the (next) to navigate through the W/O records. Click the (previous) to return to a previously viewed record.

To Select a Work Order by Work Order Number

1. Follow steps 1-3 above to select a community, and open the Work Orders screen.
2. Click the W/O # button,
3. Select the work order number you wish to work with.

To Add Special Instructions or a Note to a Work Order

1. Select a Work Order as described previously.
2. Click the Note button.
3. Click the first line under Special Instructions or Note
4. Using the PDA keyboard, or graffiti script, enter the text of your instructions / note.

To Create a New Work Order

1. Select a property record, or choose "Common Property".
2. Click the New WO button. (TOPS automatically assigns a temporary Work Order number to the record. The temporary number will be transmogrified into a permanent number when the PDA is synced with TOPS 2000™ or TOPS On-Site™.)
3. Click the 'Type' field to display the WO type menu, and select a Work Order type.
4. Click on the first summary line and enter a summary description of the work order (This field is required in order to sync new work orders from the PDA to TOPS 2000™ or TOPS On-Site™.)
5. Click on the Job field line, and enter a description for this job.
6. If necessary, change the creation date of the work order.
7. Click the Vendor button, and select the Vendor ID or Employee ID of the work order assignee.
8. Click the Auth Code button, and select the authorization code of the individual who approved the work order.

To Assign a Work Order to a Location

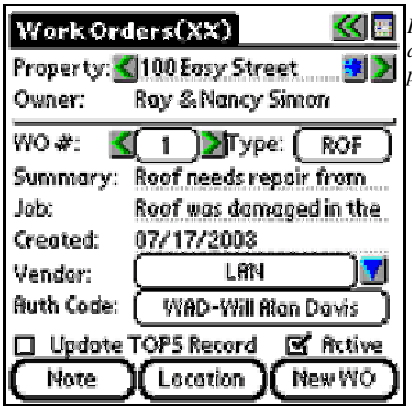
1. Select a property record, or choose common property.
2. Select a work order record. (Or create one)
3. If the location information is different from the attached property info, enter the appropriate location information.
4. If the location information is the same as the attached property, click the property button. (At the top, i.e. 100 Easy Street) This will automatically complete the location fields with the appropriate info.
5. Once the location fields are satisfactorily filled in, click Close.

To Update a Record to TOPS

1. Check the Update TOPS Record checkbox.

To Close a Work Order

1. Select a Work Order record as described previously.
2. Uncheck the Active button.



In the Work Order screen, you can assign a work order to common property or a specific property.

Service Requests

Service Requests are intended to be the middleman between a request for service by an owner, and an authorized work order. They track requests by homeowners that may or may not become Work Orders. You may create and edit service requests within the Mobile PDA, as well as convert Service Requests to Work Orders.

To Select a Property Record

1. From the main menu, click the Community field to view a pull down menu listing all of the communities currently stored in the PDA.
2. Select the community in which the property is located.
3. Click Service Requests.
4. Click the (clear) button to clear the property field.
5. Enter the first 3 or 4 letters (or numbers) of the street address. (You may enter the street name, such as easy, or you may enter the address, such as 100.) or select "Common Property"
6. Click the (search) button to view a list of properties matching the characters you entered in.
7. Locate the property you wish to open, and click on it to select it.
8. The primary owner for this property is displayed.

The Service Request module makes it easy to convert a service request to a work order with the Make Work Order button.

To Select a Service Request by Property Address

1. Follow the directions above to select a property record.
2. Click the (next) to navigate through the S/R records. Click the (previous) to return to a previously viewed record.

To Select a Service Request by Service Request Number

1. Follow steps 1-3 above to select a community, and open the Service Requests screen.
2. Click the S/R # button,
3. Select the service request number you wish to work with.

To Add an Action to be Taken or a Note to a Service Request

1. Select a property record, and a Service Request record.
2. Click the Note button.
3. Click the first line under Action To Be Taken (by the vendor/employee) or Note
4. Using the PDA keyboard, or graffiti script, enter the text of your instructions / note.

To Create a New Service Request

1. Select a property record.
2. Click the New SR button. (TOPS automatically assigns a temporary Service Request number to the record. The temporary number will be transmogrified into a permanent number when the PDA is synced with TOPS 2000™ or TOPS On-Site™.)
3. Click the 'Type' field to display the SR type menu, and select a Service Request type.
4. Click on the first summary line and enter a summary description of the service request (This field is required in order to sync new work orders from the PDA to TOPS 2000™ or TOPS On-Site™.)
5. Click on the Request field line, and enter a Description of the request (by the owner).
6. If necessary, change the creation date of the service request.
7. Click the Auth Code button, and select the authorization code of the individual who approved the work order.

To Assign a Service Request to a Location

1. Select a property record, and a service request record. (Or create one)
2. If the location information is different from the attached property info, enter the appropriate location information.
3. If the location information is the same as the attached property, click the property button. (At the top, i.e. 100 Easy Street) This will automatically complete the location fields with the appropriate info.
4. Once the location fields are satisfactorily filled in, click Close.

To Convert a Service Request to a Work Order

NOTE: We recommend performing this action in TOPS 2000™ or TOPS On-Site™ rather than your PDA, as no link will be established between the service request and the work order if the conversion is performed on the PDA.

1. Select a property record, and a Service Request record.
2. Click the Make Work Order button.
3. The service request is closed (inactive) and a new temporary work order is created.

To Update a Record to TOPS

1. Check the Update TOPS Record checkbox.

To Close a Service Request

1. Select a property record, and a Service Request record.
2. Uncheck the Active button.

CC&R Violations

Many communities cite owners when the covenants, conditions, and restrictions have been violated. The CC&R module of TOPS 2000™ or TOPS On-Site™ allows you to assign and track these violations, as well as architectural change requests made by property owners in the community.

To Select a Property Record

1. From the main menu, click the Community field to view a pull down menu listing all of the communities currently stored in the PDA.
2. Select the community in which the property is located.
3. Click CCR Violations.
4. Click the (clear) button to clear the property field.
5. Enter the first 3 or 4 letters (or numbers) of the street address. (You may enter the street name, such as easy, or you may enter the address, such as 100.)
6. Click the (search) button to view a list of properties matching the characters you entered in.
7. Locate the property you wish to open, and click on it to select it.
8. The primary owner for this property is displayed.

To Select a Violation

1. Follow the directions above to select a property record.
2. Click the (next) to navigate through the CC&R records. Click the (previous) to return to a previously viewed record.

To Select a CC&R Record by CCR Number

1. Follow steps 1-3 above to select a community, and open the CCR Violations screen.
2. Click the CCR # button,
3. Select the CCR Violation number you wish to work with.

To Add a Note to a Violation

1. Select a property record, and a CC&R violation record.
2. Click the Note button.
3. Using the PDA keyboard, or graffiti script, enter the text of your note.

To Create a New CC&R Violation

1. Select a property record.
2. Click the New CCR button. (TOPS automatically assigns a temporary CCR number to the record. The temporary number will be transmogrified into a permanent number when the PDA is synced with TOPS 2000™ or TOPS On-Site™.)
3. Click the Code button to assign a CCR Code to the record. **If PDA Defaults have been setup in TOPS 2000™ or TOPS On-Site™, the Summary, Created date, Details, and Resolve By fields will automatically fill in according to the defaults that you have set.**
4. Click the Status button and select Violation.
5. Click on the Summary line and enter a summary of the violation. (This field is required in order to sync new CC&R violations from the PDA to TOPS 2000™ or TOPS On-Site™.)
6. If necessary, change the creation date of the violation record.
7. Click on the Details line and enter a detailed description of the violation.
8. Click on the Resolve By line, and enter instructions for the owner to resolve this violation. (i.e. Mow Lawn by 7/3) These instructions print on pre-designed violation form letters.

CC&R Ride List Tip:

Instead of printing ride lists from TOPS 2000™ or TOPS On-Site™, use your PDA to quickly view open CC&R Records: Use the > (next) and < (previous) arrow buttons on the Property field line to go back and for the to other addresses quickly.

To Change the Status of a Record. (For ACC Requests)

1. Select a violation record. (Or make a new one)
2. Click the status button
3. Click on Approved, Disapproved, or Pending.

To Update a Record to TOPS 2000™ or TOPS On-Site™

1. Check the Update TOPS Record checkbox.

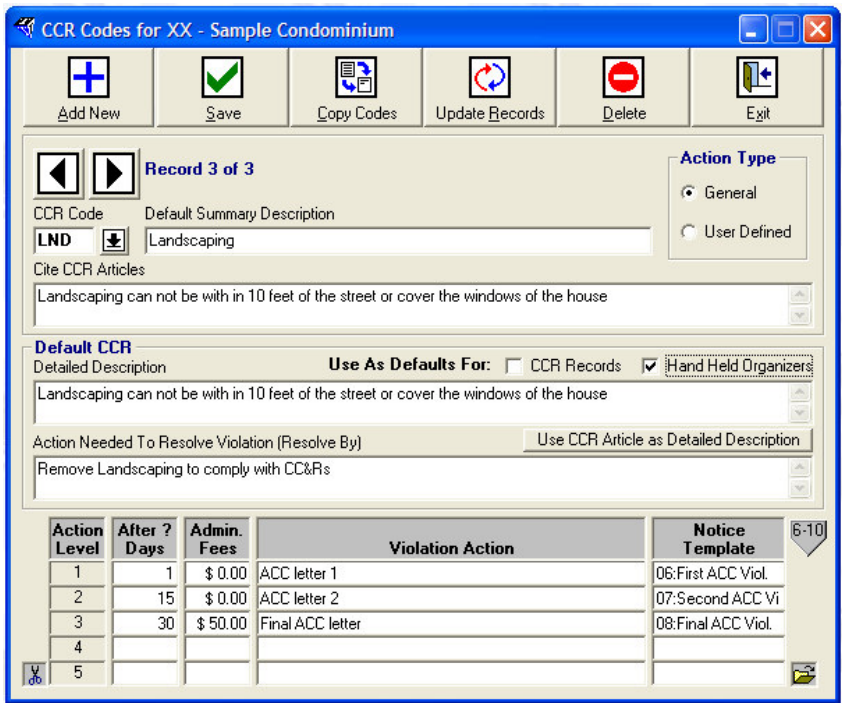
To Close a Violation

1. Select a property record, and a CC&R violation record.
2. Uncheck the Active button.

In the CC&R Violation screen, you can create a new violation record with only 3 taps of your stylus!

To Define PDA Defaults in TOPS 2000™ or TOPS On-Site™

1. In TOPS 2000™ or TOPS On-Site™, click the CC&R Button
2. Click the CCR Codes tab.
3. Click the down arrow and select the CCR Code for the definition to which you wish to define defaults.
4. Check to use as defaults for the Hand Held Organizer.
5. Enter a Detailed Description of the CC&R Code. Or click Use CCR Article as Detailed Description. Press <TAB>.
6. Enter the process the violation may be Resolved By. Press <TAB>.
7. Click Exit, or navigate to a new code to repeat the process.


CCR Codes for XX - Sample Condominium
Add New
Save
Copy Codes
Update Records
Delete
Exit
Record 3 of 3
Action Type
General
User Defined
CCR Code
Default Summary Description
LND
Landscaping
Cite CCR Articles
Landscaping can not be with in 10 feet of the street or cover the windows of the house
Default CCR
Detailed Description
Use As Defaults For:
CCR Records
Hand Held Organizers
Landscaping can not be with in 10 feet of the street or cover the windows of the house
Action Needed To Resolve Violation (Resolve By)
Use CCR Article as Detailed Description
Remove Landscaping to comply with CC&Rs
Action Level
After ? Days
Admin. Fees
Violation Action
Notice Template
6-10
1 1 $ 0.00 ACC letter 1 06:First ACC Viol.
2 15 $ 0.00 ACC letter 2 07:Second ACC Vi
3 30 $ 50.00 Final ACC letter 08:Final ACC Viol.
4
5

Once these defaults have been set, you may select a CCR Code on your PDA, and the Created date, Details, and Resolve By fields will automatically fill in according to the defaults that you have set.

Vendor Information

The Vendor Information section of the PDA interface is intended to allow you to quickly access existing vendor information. This can be extremely useful in order to contact community contractors and vendors from the field.

This interface is READ ONLY! You may view vendor information that currently exists in TOPS 2000™ or TOPS On-Site™, but you may not add, edit, or delete vendors from the PDA.

To Select a Vendor

1. From the main menu, click the Community field to view a pull down menu listing all of the communities currently stored in the PDA.
2. Select the community in which the vendor is located.
3. Click Vendors.
4. Click the (clear) button to clear the Vendor field.
5. Enter the first 2 or 3 letters (or numbers) of the Vendor ID.
6. Click the (search) button to view a list of tags matching the characters you entered in.
7. Locate the vendor you wish to open, and click on it to select it.
8. The vendor information for this vendor is displayed.

Vendors are set up in TOPS 2000™ via the A/P module. Therefore, if you have written checks to an individual that you might not specifically consider a vendor, they will show up in the vendor list in the TOPS Mobile PDA.

Pool Pass

The pool pass module in the TOPS Mobile PDA allows you to give your lifeguards an up to date program that keeps track of pass holders. This is an invaluable resource when dealing with shared facilities, particularly if association documents dictate that facility use can be denied for non payment of dues.

This interface is READ ONLY! You may view pool passes that currently exist in TOPS 2000™ or TOPS On-Site™, but you may not add or delete pool passes from the PDA. You may however, write notes on pass holders in the PDA. However, these notes will not sync to TOPS, and will be deleted upon the next sync.

To Select a Pool Pass

1. From the main menu, click the Community field to view a pull down menu listing all of the communities currently stored in the PDA.
2. Select the community in which the pool is located.
3. Click Pool Pass.
4. Click the (clear) button to clear the name field.
5. Enter the first 2 or 3 letters (or numbers) of the pass holder's name.
6. Click the (search) button to view a list of pass holders whose names match the characters you entered in.
7. Locate the person whose pass you wish to open, and click on it
8. The information for this member is displayed.

The notes field in the Pool Pass module is for temporary notes within a single session ONLY! Notes do not synch back into TOPS 2000™ or TOPS On-Site™.

TOPS Facts

TOPS Facts is the PDA version of the TOPS Community Fact Sheet contained in TOPS 2000™ and TOPS On-Site™. This information can be invaluable to the property manager on the go, as well as onsite staff, and after hours emergencies.

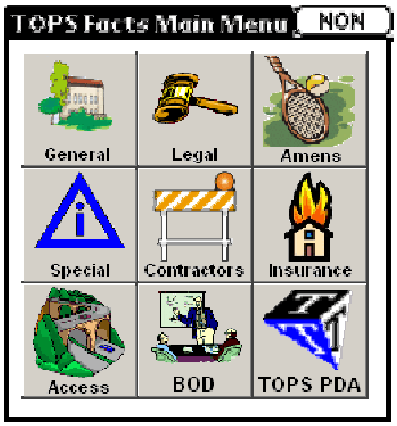
TOPS Facts on the PDA is an important reference tool to provide information about the communities you manage. The interface is READ ONLY! You must enter any pertinent information into the TOPS Community Fact Sheet in TOPS 2000™ or TOPS On-Site™. You may view association information in the PDA, but you may not edit it.

The TOPS Facts menu consists of 9 sections. Each section corresponds with a matching tab in the Community Fact Sheet in TOPS 2000™ or TOPS On-Site™, with the exception of the Board of Directors section, which corresponds with the Board of Directors feature in the Owner module in TOPS 2000™ or TOPS On-Site™.

To Access Community Facts

1. From the main menu, click the XX (community selector) to view a pull down menu listing of all the communities currently stored in the PDA.
2. Select the community in which the information is located.
3. Click a button to view the desired community information.
4. At any time you may return to the TOPS Mobile PDA main menu by clicking the TOPS PDA button in the bottom right corner.

You may select a community, and then make a program selection from the main menu.



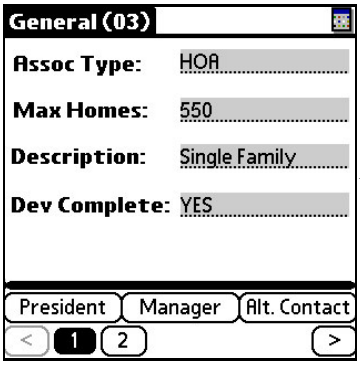
General Facts

Use the General area to access a listing of general community information about the association, and important contacts in the association.

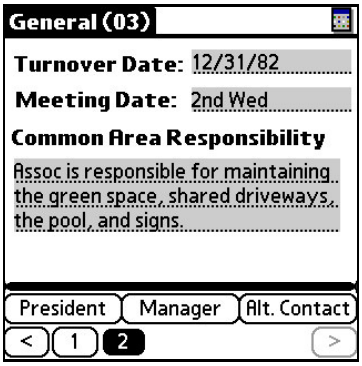
Access a read only listing of general community information about the association, turnover information, meeting dates, common area responsibility, and important contacts in the association.

Data that may be stored in General:

There are five (5) available screens in the General section. Each screen contains basic information on the community, and designated contacts. Click the appropriate button at the bottom of the screen, or click the arrow buttons to access the information.



Use the arrow keys or click the appropriate buttons to navigate through the general info. You can click the President, Manager, or Alt Contact buttons to view contact information for community representatives.



Legal Facts

Use the Legal area to access important community legal information including quorum requirements and legal policies as set down in the association documents.

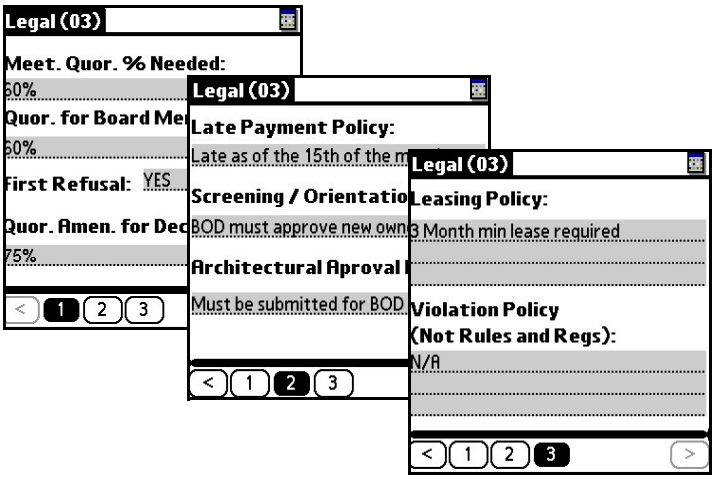
There are three (3) available screens in the Legal section. Each section contains valuable legal information for the community. Click the appropriate button at the bottom of the screen, or click the arrow buttons to access the information.

Data that may be stored in Legal:

Screen One: The first screen contains all quorum percentages required by the association documents.

Screen Two: The second screen stores community policies for late payments, orientation, and architectural approval.

Screen Three: The third screen contains leasing and violation policies.



The Legal Information section can help solve problems with owners and during board meetings by providing quick reference to the rules set down in the association's documents.

Amenity Facts

Use the Amenities area to access a listing of facilities maintained by the association. The list may contain up to 17 different amenities, with space for the facility name, quantity, status, and notes.

Clicking a facility will reveal a 'more info' button that will display the full record of the amenity, as entered into the Community Fact Sheet in TOPS 2000™ or TOPS On-Site™

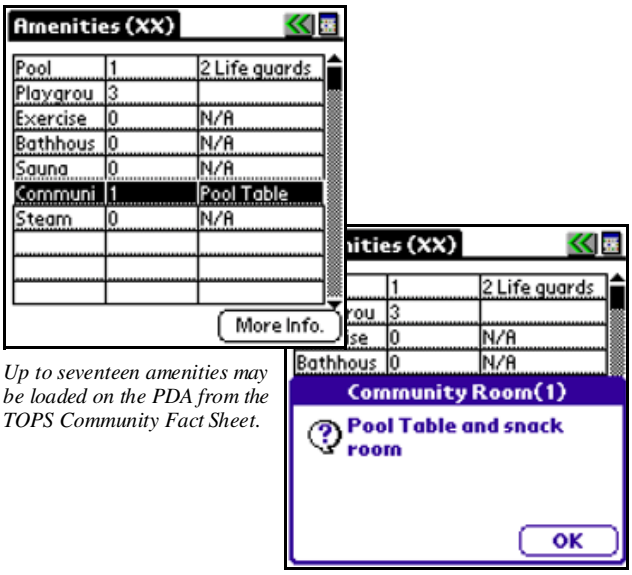
Data Format in Amenities:

Column One: The name of the facility.

Column Two: The number of facilities of this type.

Column Three: Details or notes on each facility

More Info: Click a facility to display the More Info button, which will provide full details on this facility.



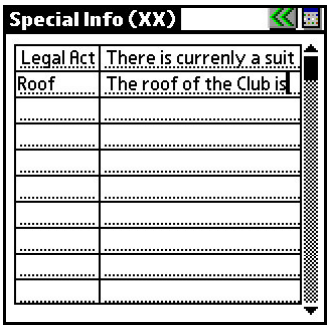
Up to seventeen amenities may be loaded on the PDA from the TOPS Community Fact Sheet.

Special Facts

The Special section in the TOPS Community Fact Sheet allows TOPS users to create custom fields to track any information. You cannot edit these fields in the PDA, but you can maintain them in TOPS 2000™ or TOPS On-Site™ and review them in the TOPS Mobile PDA.

Special info consists of ten, fully customizable fields.

Clicking a record will reveal a 'more info' button that will display the full record of the listing, as entered into the Community Fact Sheet in TOPS 2000™ or TOPS On-Site™



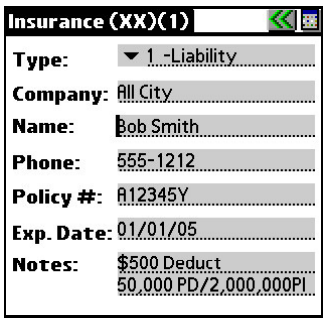
Contractors Facts

Unlike the vendors listing in the A/P module of TOPS 2000, which lists every vendor to whom you have ever written a check, the contractors section of the TOPS Community Fact Sheet is reserved for current Contractors who are actually doing work for the community and their contact info.

Insurance Facts

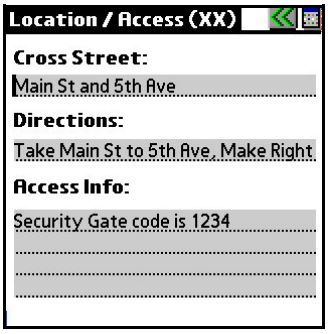
Use the Insurance section of TOPS Facts to access information on the insurance policies maintained by and for the association. Includes multiple insurance types, contact info, policy identification, expiration, and notes.

Unlimited insurance companies may be loaded. Insurance types may include liability, property, D & O, fidelity bond, etc.



Accessibility Facts

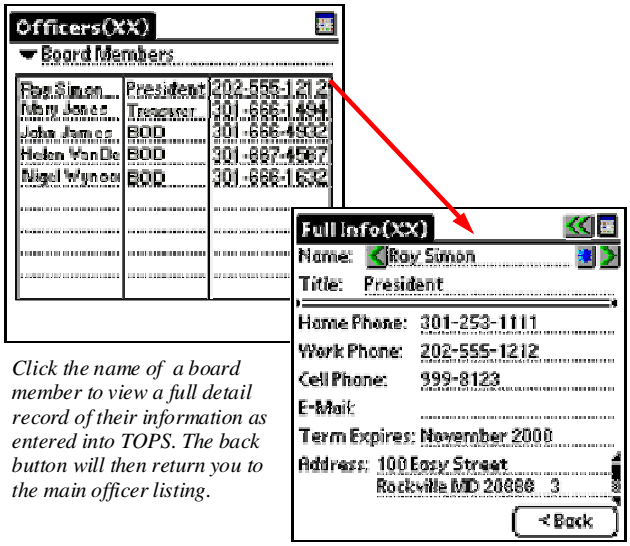
Use the Accessibility section to quickly access a listing of cross streets, directions, and access info for this community.



Board of Directors

Quickly access information on the Board of Directors for this association. The Board of Directors section of the TOPS Mobile PDA corresponds with the Board of Directors feature in the Owner module in TOPS 2000™ or TOPS On-Site™.

Clicking an owner's record will reveal a 'full info' button that, when clicked, will display the full record of the board member, as entered into the Community Fact Sheet in TOPS 2000™ or TOPS On-Site™



Click the name of a board member to view a full detail record of their information as entered into TOPS. The back button will then return you to the main officer listing.

BOD/Officers Tip:

Note the pull down menu under the title bar called Board Members. If committee names and member information has been entered into TOPS, use this pull down to switch from the Board to the various committees.

Troubleshooting

Installation Problems

There are two potential errors that you may receive upon installation. Both will provide the same error message.

The Floppy Disk is Write Protected

Remove the disk from the diskette drive and look on the back of the disk (where the round metal wheel is) move the small square in the upper left hand corner down to the unlocked position. Place the disk back in the drive and continue.

No Permission to Write to Hard Drive or Install New Software

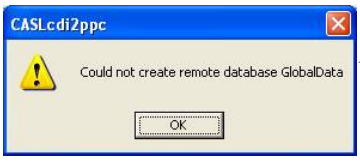
You may not have permission to save files on your computer. Contact your network administrator to request read/write/install access permission levels. Once permission is achieved, place the disk back in the drive and continue.

Setup
There was an error writing to drive A:.
Check to make sure the disk is in the drive and not write protected.
The currently selected options will be reset.
OK

If there is an error with the installation, the above error message will appear when you click 'Apply'.

Could Not Create Remote Database (Pocket PC)

You need to close all of the programs that are running on your Pocket PC. This can be done by going to Start, Settings, System Tab, Memory, Running Programs Tab, Stop All.



If your Pocket PC displays the error message pictured here, close all programs and try again.

Chunk Overlock Error (Palm)

Reset the Palm. If the soft reset button on the screen does not work, push in the hard reset button on the back of the Palm with a paperclip.

Uninstallation

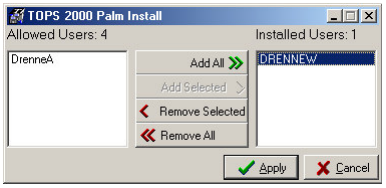
Two steps must be performed to complete the uninstall process. First, The authorized user must be removed from TOPS to allow additional users to use the key. Second, the program must be removed from the PDA. Following are instructions for each step.

To Remove an Authorized User Key from a Palm™ Powered PDA

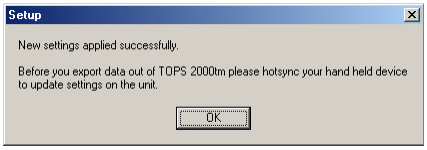
1. Insert the install disk from the back of this manual into the floppy disk drive.
2. Click Start, run. Type "**A:\keyinstall.exe**".
3. Click a User ID on the right side. The Remove Selected button will become active.
4. To remove a key for the selected user, click the **Remove Selected** button. To remove keys for all valid users click **Remove All**.
5. Click the **Apply** button
6. If the uninstall is successful you will see the success screen.

To Remove The Program from a Palm™ Powered PDA

1. Activate your Palm™ PDA.
2. Click the Menu button
3. Under the App menu, click Delete…
4. Locate and click on TOPS 2000
5. Click the Delete button
6. Click Yes.
7. Click Done.



Use the Install screen to remove authorized users from the TOPS 2000™ HHO Interface.


Setup
New settings applied successfully.
Before you export data out of TOPS 2000tm please hotsync your hand held device to update settings on the unit.
OK

When the removal is successful, the success message will be displayed.

To Remove an Authorized User Key from a Pocket PC Powered PDA

1. Connect your Pocket PC powered to your computer. It MUST be connected for uninstallation to work correctly.
2. Insert the install disk from the back of this manual into the floppy disk drive.
3. Click Start, run. Type "**A:\keyinstall.exe**".
4. Click [Pocket PC user] on the right side. The Remove Selected button will become active.
5. To remove a key for the selected user, click the **Remove Selected** button. To remove keys for all valid users click **Remove All**.
6. Click the **Apply** button
7. If the uninstall is successful you will see the success screen.

To Remove The Program from a Pocket PC Powered PDA

1. On the Pocket PC Unit, click Start, Settings.
2. Click on the System Tab.
3. Click the 'Remove Programs' icon.
4. Click TOPS Software TOPS PDA and then click Remove.
5. Click CASLsoft CASLppc Runtime and then click Remove.
6. Click OK in the top right corner.
7. Click the X in the upper right corner to close the settings window.

Appendix:

Support

Contact TOPS Software for support on this and other TOPS products at

1-800-899-5689 or **support@topssoft.com**

between the hours of 9:00 am and 5:30 pm Monday through Friday.

Check our support web site for a support knowledge base and more: www.topssoft.com/support

System Requirements

1. TOPS 2000™ or TOPS On-Site™ must be installed and fully compliant with system requirements. (see www.topssoft.com/TOPS_2000/t2000sysreq.htm)
2. CD Containing Mobile PDA Installation software.
3. A floppy diskette containing the registered security keys for the TOPS Mobile PDA.
4. At least one PDA; must be either Palm™ OS or Pocket PC® OS.
5. At least 8 MB of RAM in a Pocket PC powered PDA, at least 2 MB of RAM in a Palm powered PDA.

Resources

- www.topssoft.com
- www.palm.com